

EXHIBIT Z



HARVARD
School of Public Health

Summary and Chartpack

USA Today/Kaiser Family Foundation/Harvard School of Public Health

**The Public on Prescription Drugs and
Pharmaceutical Companies**

March 2008

Methodology

The *USA Today*/Kaiser Family Foundation/Harvard School of Public Health Survey Project is a three-way partnership. *USA Today*, Kaiser, and the Harvard School of Public Health jointly design and analyze surveys examining health care issues.

Representatives of *USA Today*, The Henry J. Kaiser Family Foundation, and the Harvard School of Public Health worked together to develop the survey questionnaire and analyze the results. *USA Today* retains editorial control over the content published by the paper. The project team included Jim Norman, *USA Today* polling editor; Drew E. Altman, president of the Kaiser Family Foundation, Mollyann Brodie, vice president and director of public opinion and media research, and Liz Hamel, associate director of public opinion and media research; and Robert J. Blendon, professor of health policy and political analysis at the Harvard School of Public Health and the John F. Kennedy School of Government, and John M. Benson, managing director of the Harvard Opinion Research Program in the Harvard School of Public Health.

The Public on Prescription Drugs and Pharmaceutical Companies is a nationally representative, random sample survey of 1,695 adults ages 18 years and older. The survey was conducted by telephone from January 3-23, 2008. Telephone interviews were carried out in English and Spanish by ICR/International Communications Research of Media, PA.

The margin of sampling error for the survey is plus or minus 3 percentage points for total respondents. For results based on smaller subsets of respondents the margin of sampling error is higher. Sampling error is only one of many potential sources of error in this or any other public opinion poll.

Values less than 0.5% are indicated by an asterisk (*). "Vol." indicates that a response was volunteered by respondent, not an explicitly offered choice. Percentages may not always add up to 100% due to rounding.

KEY FINDINGS

Key finding #1: Americans love the products that pharmaceutical companies produce, but they are less favorable towards the companies themselves, mainly because they feel they are getting ripped off by high prices driven by high drug company profits.

While a plurality (47%) of the public says they have a favorable view of pharmaceutical companies, more than four in ten (44%) have an unfavorable view of these companies, outranked only by health insurance companies (54%) and oil companies (63%) (Chart 1).

Despite these mixed views of pharmaceutical companies, the public has positive views towards prescription drugs in general, and even has some nice things to say about the companies that make them. Nearly three-quarters (73%) say prescription drugs developed over the past 20 years have made the lives of people in the U.S. better (including 52% who say “a lot” better), and nearly two-thirds (63%) say the same about their own and their family members’ lives. Very few say prescription drugs have made Americans’ lives (10%) or their own lives (4%) worse (Chart 2).

Among those with a favorable opinion of drug companies, when asked why their opinion is favorable, about two-thirds (64%) mention the quality and/or importance of the products and research provided by the industry (Chart 3). However, people don’t necessarily see drug companies standing out from other types of companies because of the work that they do. Just about a quarter (26%) of the public believes that, by researching and developing new drugs, pharmaceutical companies make more of a contribution to society than most other companies, while more than half (56%) say their contribution is about the same (Chart 4).

On the other hand, the high cost of drugs and high profits made by drug companies are Americans’ biggest beef with the pharmaceutical industry. Among those with an unfavorable opinion of drug companies, when asked why their opinion is unfavorable, two-thirds (68%) give responses related to high prices, high profits, or company greed (Chart 5).

Negative opinions about drug prices and drug company profits are not limited to those with an unfavorable view of pharmaceutical companies. Among all Americans, eight in ten (79%) say the cost of prescription drugs is unreasonable (Chart 6), and seven in ten (70%) say pharmaceutical companies are too concerned about making profits and not concerned enough about helping people (Chart 7). Profits made by pharmaceutical companies are also seen as the biggest driver of the cost of drugs (79% say this is a “major” factor, compared with 72% for the cost of medical research, 62% for the cost of advertising, and 56% for the cost of lawsuits) (Chart 8). And while most people trust pharmaceutical companies at least “somewhat” when it comes to developing new drugs and providing reliable information, six in ten (58%) do *not* trust pharmaceutical companies to price their products fairly (Chart 9).

Americans’ anger over the cost of prescription drugs may stem at least in part from a sense that they are being charged unfairly compared to people in other countries. Three-quarters (76%) of the public thinks that people in the U.S. pay higher prices for the same prescription drugs than people in Canada, Mexico, and Western Europe (Chart 10).

Further evidence that high prices and profits are the biggest negative in people’s views of the pharmaceutical industry comes from responses to questions about government regulation. While pluralities say there is about the right amount of regulation when it comes to drug safety (47%) and making sure prescription drug advertisements are not misleading (48%), nearly two-thirds (64%) say there is *not enough* regulation when it comes to limiting the price of prescription drugs (Chart 11). Even when presented with the argument that price regulation could lead to less research and development on new drugs, nearly half (48%) say there should be more regulation in this area (Chart 12).

Despite these negative views of prescription drug prices overall, many people do recognize a role for prescription drugs in keeping down the overall cost of health care; six in ten (59%) say prescription drugs reduce the need for expensive medical procedures and hospitalizations, and nearly as many (56%) say prescription drugs reduce health care costs by preventing illnesses (Chart 13).

The amount and content of prescription drug advertising is often attacked by critics of the pharmaceutical industry. However, this survey finds that, while the public does express some negative views about advertising, these views play less of a role in people's negative views of the industry compared with high prices and profits. More than half the public (53%) say prescription drug advertising is mostly a good thing, and two-thirds (67%) agree that these ads educate people about treatments and encourage them to get help for conditions they might not have been aware of (Chart 14).

On the negative side, people's biggest beef with advertising again comes back to cost; more than three-quarters say the cost of advertising makes prescription drugs too expensive, and four in ten say this bothers them "a lot." While about two-thirds say there are too many prescription drug ads on television (68%) and that ads encourage people to take medications they don't need (66%), fewer say they are bothered "a lot" by either of these issues (27% and 34%, respectively). Nearly half the public (46%) thinks that many prescription drug ads are too sexually explicit, but just one in five (20%) say this bothers them a lot (Chart 15).

Negatives of prescription drug ads	% who agree with each	% who say each bothers them "a lot"
The cost of ads makes drugs too expensive	77%	41%
Ads encourage people to take drugs they don't need	66	34
There are too many drug ads on television	68	27
Many ads are too sexually explicit	46	20

Key finding #2: Significant shares of people are having difficulty paying for prescription drugs, and many have not filled prescriptions, skipped doses, or cut pills in half as a result.

More than half (54%) of Americans say they currently take prescription medicines, including 50% who take them daily. One in five (19%) say they are currently taking four or more prescription drugs (Chart 18). Not surprisingly, prescription drug use is more common among the elderly (42% currently take four or more drugs) and those in fair or poor health (46% take four or more drugs).

Significant shares report difficulty affording the drugs they need. Four in ten adults (41%) say it is at least somewhat of a problem for their family to pay for prescription drugs they need, including 16% who say it is a serious problem (Chart 19). Three in ten (29%) say that in the last two years, they have not filled a prescription because of the cost, and nearly a quarter (23%) say they have cut pills in half or skipped doses in order to make a medication last longer. Four in ten report at least one of these three problems (a serious problem paying for drugs, not filling a prescription because of cost, and/or skipping doses in the past two years) (Chart 20).

Problems paying for prescription drugs, not filling prescriptions because of cost, and skipping doses are even more common among those who take larger numbers of prescription drugs, those who don't have insurance to cover their prescription drug costs, and those with lower incomes (Chart 21).

	Public overall	Currently take any Rx	Currently take 4+ Rx drugs	No insurance to pay for Rx	Income <\$25K
It's a SERIOUS problem for you and your family to pay for Rx drugs you need	16%	19%	27%	32%	29%
In last 2 years, have not filled a prescription because of cost	29	36	41	39	40
In last 2 years, have skipped doses or cut pills in half to make Rx last long	23	34	39	27	31
Percent reporting at least one of above three problems	40	50	59	52	54

While many people report problems paying for drugs, there is at least some awareness of pharmaceutical company programs to provide free or discounted drugs to people who cannot afford them. Nearly six in ten adults (58%) have heard of these programs, but two-thirds (65%) of those who have heard of them think the programs don't go far enough to help people who need them (Chart 22). About one in six people (16%) say that they or someone in their family has ever applied for discount or free medications from a pharmaceutical company.

Key finding #3: Prescription drug advertising has driven a third of Americans to talk to their doctors about specific prescription drugs, and many of these people got a prescription from their doctor as a result.

Almost all Americans (91%) have seen or heard prescription drug ads, and nearly a third (32%) have talked to a doctor about a prescription drug they saw advertised (Chart 23). Among those who have talked to a doctor about a drug they saw advertised, 44% say their doctor gave them a prescription for the drug they asked about, and 54% say their doctor recommended another prescription drug (resulting in 82% who got a prescription either for the drug they asked about and/or another drug) (Chart 24).

As mentioned previously, people's views of prescription drug ads are mainly positive. Slim majorities of adults overall say drug ads do an excellent or good job telling people about the potential benefits of a medication (56%) and the condition a drug is designed to treat (54%), but a similar share (53%) say these ads do only a fair or poor job telling people about the potential side effects of the drug (Chart 25).

Six in ten (60%) think ads for medications to treat mental health conditions are mostly good because they improve understanding of these conditions and encourage people to seek treatment, while about a third (36%) think these ads are mostly bad because they encourage people without serious mental health conditions to think they need treatment (Chart 26).

Key finding #4: Despite recent controversies about how pharmaceutical companies test drugs, the majority of Americans believe these companies do enough to test and monitor the safety of their drugs and that they conduct these tests in an ethical way. A majority also believes that drug companies do not have too much influence over which drugs are approved by the FDA, another issue that has been in the news. However, in each of these areas, a substantially minority has a negative view.

Nearly eight in ten Americans (78%) are at least somewhat confident that prescription drugs sold in the U.S. are safe, though just over a quarter (27%) are "very" confident. About half (49%) think drugs manufactured in other countries and sold in the U.S. are about as safe as those made here, but a notable four in ten (41%) think they are less safe (Chart 27).

Despite recent controversies, over half the public (55%) thinks pharmaceutical companies do enough to test and monitor the safety of their drugs (Chart 28), and the same share (55%) trust pharmaceutical companies at least somewhat to quickly notify the public about safety concerns (Chart 9). Majorities also think that pharmaceutical companies act in an ethical way when testing their products on people (62%) and on animals (56%) (Chart 29). However, substantial minorities hold negative views in these areas: four in ten (41%) think pharmaceutical companies *do not* do enough to test and monitor the safety of their products; 44% do not trust companies to notify the public quickly about safety concerns; and about three in ten think most pharmaceutical companies act unethically when testing their drugs on people (28%) and animals (30%).

When it comes to the drug review and approval process, most people do not think pharmaceutical companies have too much influence over the FDA, and a majority would like to see the government move more quickly when approving new drugs. About half (51%) say that pharmaceutical companies have too little or the right amount of influence on which drugs are approved by the FDA, compared with about four in ten (42%) who say these companies have too much influence (Chart 30). More than half (52%) say the government moves too slowly when reviewing and approving new drugs (Chart 31).

Key finding #5: Americans are divided over who should have primary responsibility for developing new drugs, seeing a role for drug companies, universities, and the federal government.

Pharmaceutical companies are seen as playing the biggest role currently in researching and developing new drugs. However, the public is split when it comes to who *should* be primarily responsible for developing new drugs, with roughly equal shares saying pharmaceutical companies (28%) and universities (27%), and somewhat smaller shares choosing the federal government (16%) and non-profit organizations (11%) (Chart 32).

	% who think each play a major role in researching and developing new drugs	% who say each SHOULD be primarily responsible for developing new drugs
Pharmaceutical companies	75%	28%
Universities	60	27
Federal government	49	16
Non-profit organizations	24	11
Some combination		13

When it comes to the more difficult issues of "orphan drugs" (those to treat diseases that affect a relatively small number of people) and drugs for people in poorer countries, the majority of Americans do not believe that drug companies should have the main responsibility for making sure research is conducted. When it comes to orphan drugs, nearly half (48%) say the federal government should take responsibility for research (compared with 27% who say pharmaceutical companies). Similarly, when it comes to drugs for diseases that mostly affect people in poorer countries around the world, four in ten (42%) place the responsibility on international non-profits (compared with 19% for pharmaceutical companies) (Chart 33).

ADDITIONAL FINDINGS

Sources of information and talking to doctors

Doctors rank number one in terms of the sources people rely on for information about prescription drugs. More than seven in ten (72%) say they rely on their doctor "a lot" to provide accurate information about prescription medicines, compared with 51% for their pharmacist, 43% for the information contained in drug product packaging, 22% for government agencies like the FDA, and 15% for family and friends (Chart 34).

However, when it comes to the cost of drugs, people are more likely to talk to their pharmacist than their doctor. Fewer than half (44%) say they usually talk to their doctor about the cost of a drug when they get a new prescription, but 61% say they usually talk to their pharmacist about whether cheaper alternatives are available when filling a prescription (Chart 35). A few groups are more likely to say they usually talk to their doctor about the cost of their medications, including those who say paying for drugs is a serious problem for their family (64%), those who have applied for a pharmaceutical company discount (64%), those who do not have insurance to help pay for drugs (56%), and those with incomes less than \$25,000 a year (57%).

Proving effectiveness of new drugs compared to existing treatments

On the question of whether new drugs should be approved only if they are proven to be more effective than existing treatments, more than half think the FDA should make decisions based only on whether drugs are safe and effective. However, nearly six in ten say insurance companies should only pay for new drugs if they have been proven to be more effective than existing alternatives (Chart 36).

	FDA should approve new drugs...	Insurance companies should pay for new drugs...
Only if they are proven to be more effective than existing treatments	44%	58%
Regardless of whether they are proven to be more effective than existing treatments	53	38

More on those with favorable and unfavorable opinions of pharmaceutical companies

While the public overall is somewhat split between having a favorable (47%) and an unfavorable (44%) opinion of pharmaceutical companies, some groups express different levels of favorability than others. Groups who have the highest share saying they have a favorable opinion of drug companies include Hispanics (63% favorable), those who have applied for drug company discounts (56%), Republicans (56%), those with a household income less than \$25,000 (55%), those with a high school education or less (52%), and people who live in the suburbs (51%). Groups with the highest share expressing an *unfavorable* opinion of drug companies include those with household incomes between \$50,000 and \$75,000 (54%), college graduates (51%), people who live in rural areas (51%), those with household incomes of \$75,000 or more (49%), and non-Hispanic whites (48%).

Those who have an unfavorable opinion of pharmaceutical companies are more likely than those with a favorable opinion to express a variety of negative views, particularly when it comes to pharmaceutical company profits and prices, and the amount of influence drug companies have over various government processes.

However, there are some areas where even majorities of those who have unfavorable opinions of drug companies express positive views of these companies or of the drugs themselves. For instance, two-thirds (66%) of those with an unfavorable view of pharmaceutical companies say that prescription drugs developed over the past 20 years have made the lives of people in the U.S. better, and over half (53%) say the same about their own and their family members' lives. Majorities of this group also believe that most pharmaceutical companies engage in ethical testing practices when they test their drugs on people (56%) and animals (53%). More than two-thirds (68%) of those with an unfavorable view of drug companies are at least somewhat confident that prescription drugs sold in the U.S. are safe, and majorities trust pharmaceutical companies at least somewhat to offer reliable information about their products and to develop new, effective drugs.

	Opinion of drug companies	
	Favorable (48% of public overall)	Unfavorable (44% of public overall)
Pharmaceutical companies are too concerned about making profits, and not concerned enough about helping people	54%	86%
Rx drug costs are unreasonable	65	94
Rx drug advertising is mostly a bad thing	27	56
Pharmaceutical companies have too much influence on...		
...which drugs are approved by the FDA	28	57
...laws and regulations passed by Congress	38	66
...efforts to change the health care system in the U.S.	30	61
Trust pharmaceutical companies a lot/somewhat to...		
...offer reliable information about how well their drugs work	79	61
...offer reliable information about side effects and safety of their drugs	82	62
...develop new, effective drugs	85	73
Rx drugs developed over past 20 years have made lives of people in U.S. better	81	66
Rx drugs developed over past 20 years have made your/family's lives better	74	53
Very/somewhat confident that Rx drugs sold in the U.S. are safe	89	68
Most pharmaceutical companies act in an ethical way when researching and testing new drugs on people	70	56
Most pharmaceutical companies act in an ethical way when researching and testing new drugs on animals	62	53

Experiences and opinions of people with lower incomes

Being older and in poorer health, lower-income people are more likely to take prescription drugs, and regularly take more prescriptions than their higher-income counterparts. Nearly a third (32%) of people in households earning less than \$25,000 a year say they currently take four or more prescription drugs, compared with 12% of those earning \$75,000 or more.

Not surprisingly, those with lower incomes are also more likely to have serious problems paying for medications, and to say that in the past two years, they have not filled prescriptions because of the cost and/or skipped doses to make a medication last longer. Fully four in ten people with incomes less than \$25,000 report not filling a prescription in the past two years because of cost, compared with fewer than two in ten (18%) of those with incomes of \$75,000 or more. At least some of these problems may stem from the fact that lower-income people are less likely to have insurance coverage for prescription drugs (63% of those earning less than \$25,000 report having coverage, compared with 95% of those earning \$75,000 or more). Lower-income people are also more likely to say they talk to their doctors about the cost of prescriptions, and that they have applied for drug company discounts.

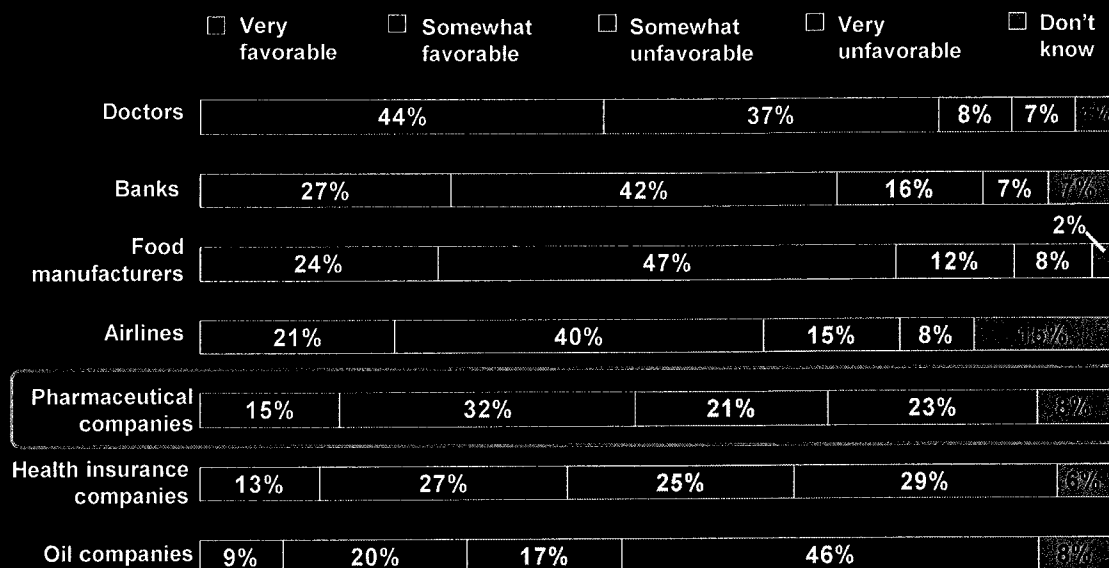
Despite having more difficulty paying for prescriptions, people with incomes less than \$25,000 are somewhat more likely to have a favorable opinion of drug companies (55%, compared with 44% of those with incomes of \$25,000 or more), and express somewhat less negative views of drug company profits, prices, marketing and advertising. For instance, 66% of those with incomes less than \$25,000 say that pharmaceutical companies are too concerned about making profits and not concerned enough about helping people, compared with 74% of those with higher incomes. And while more than half (55%) of people with incomes over \$25,000 think pharmaceutical companies spend too much money marketing to doctors, just 38% of people with lower incomes share this view.

However, in a few areas, lower-income people express slightly more negative views than their higher-income counterparts. For example, people with lower incomes are somewhat less likely to say prescription drugs developed over the past 20 years have made Americans' lives better, and somewhat *more* likely to think most pharmaceutical companies engage in unethical testing practices.

	Household income			
	<\$25K	\$25-49K	\$50-74K	\$75K+
Age 65+	25%	17%	11%	6%
Health status is fair or poor	43	20	11	5
Have a disability or chronic disease that keeps from participating in daily activities	39	20	16	9
Currently take any Rx drugs	64	53	56	48
...take 4 or more Rx drugs	32	17	14	12
Serious problem for you and your family to pay for drugs	29	19	13	5
Last 2 years, ever not filled a prescription because of the cost	40	33	28	18
Last 2 years, ever skipped doses or cut pills in half	31	28	19	14
Have insurance that helps pay for drugs	63	78	88	95
Usually talk to doctor about cost of medicine	57	47	37	34
Self or family member ever applied for a discount from a pharmaceutical company	29	15	13	8
Favorable view of pharmaceutical companies	55	46	36	46
Cost of Rx drugs is unreasonable	72	87	87	78
Pharmaceutical companies are too concerned about making profits, and not concerned enough about helping people	66	71	80	71
Rx drug advertising is mostly a good thing	59	55	43	48
Pharmaceutical companies spend too much money advertising to patients	52	54	70	67
Pharmaceutical companies spend too much money on marketing to doctors	38	54	58	56
Rx drugs developed over past 20 years have made lives of people in U.S. better	66	68	77	82
Most pharmaceutical companies engage in testing practices that are unethical and put people at risk	40	34	27	20

Chart 1

General Opinions of Pharmaceutical Companies and Other Groups

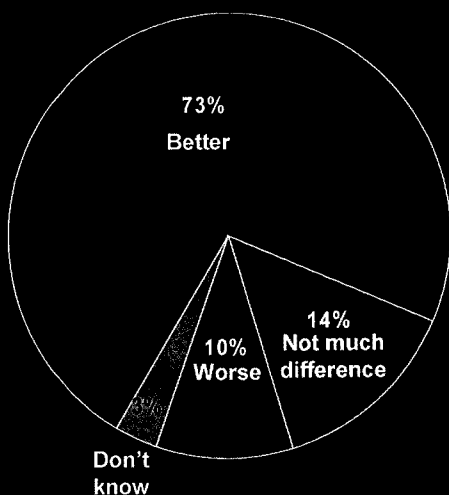


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

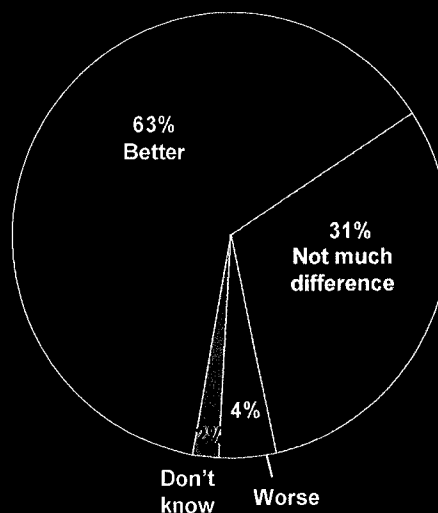
Chart 2

Most Think Prescription Drugs Improve People's Lives

Do you think prescription drugs developed over the past 20 years have generally made the lives of people in the US better, worse or haven't they made much difference?



Do you think prescription drugs developed over the past 20 years have generally made your own life and your family members' lives better, worse or haven't they made much difference?

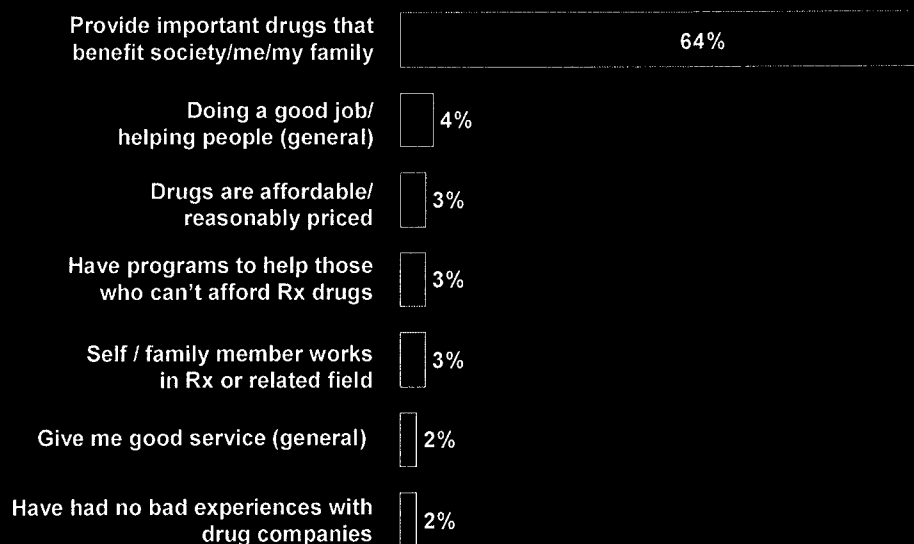


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 3

What is the Main Reason You Have a Favorable Opinion of Pharmaceutical Companies?

Among the 47% who say their opinion of pharmaceutical companies is favorable: percent citing the following reasons in an open-ended question...

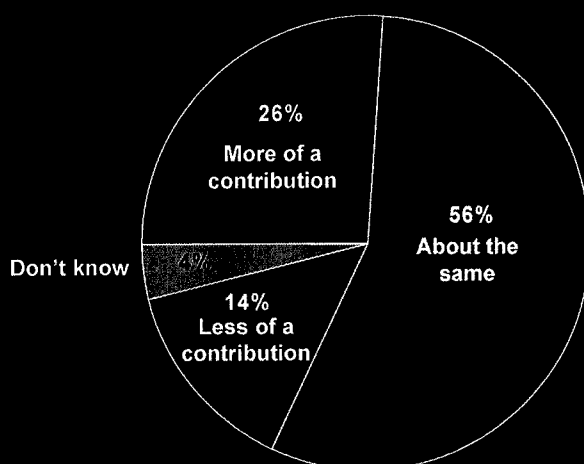


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 4

Most Think Pharmaceutical Companies' Contribution to Society is the Same as Other Companies

By researching and developing new drugs, do you think pharmaceutical companies are making more of a contribution to society than most other companies, less of a contribution, or about the same?

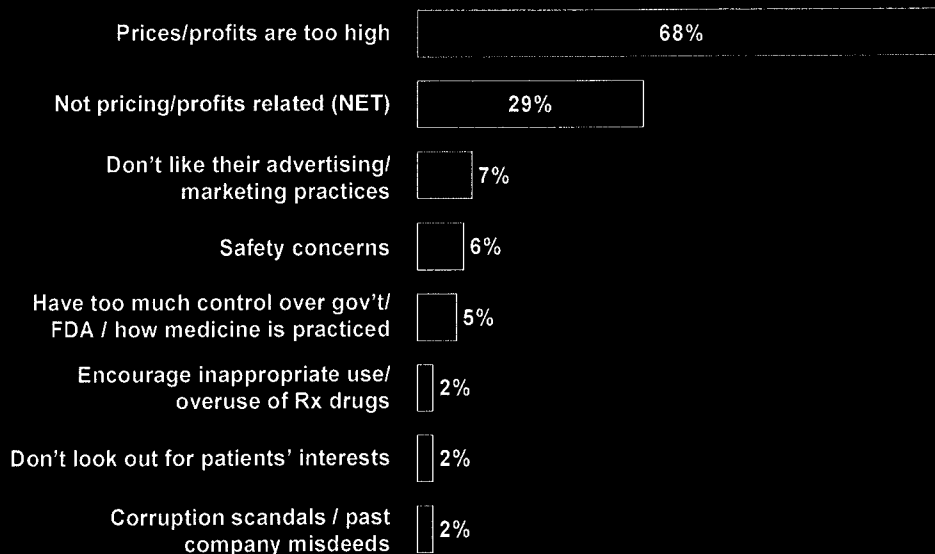


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 5

What is the Main Reason you Have an Unfavorable Opinion of Pharmaceutical Companies?

Among the 44% who say their opinion of pharmaceutical companies is unfavorable: percent citing the following reasons in an open-ended question...

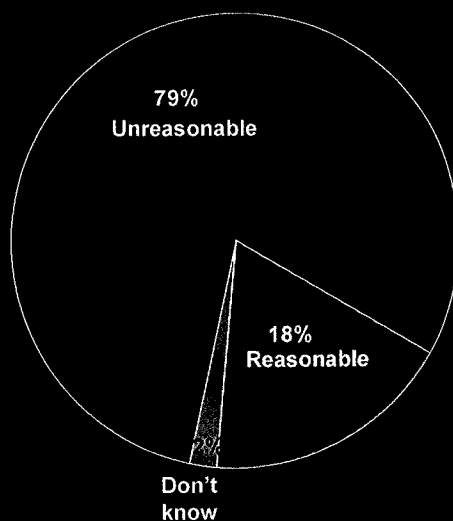


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 6

Most Say Prescription Drug Cost is Unreasonable

In general, do you think the cost of prescription drugs is reasonable or unreasonable?

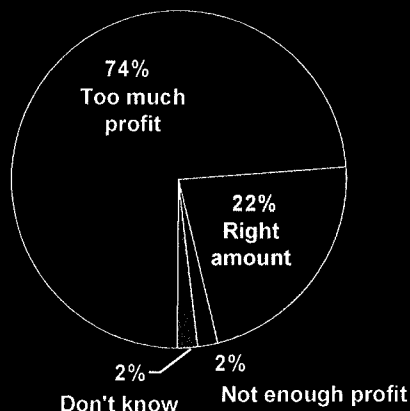


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 7

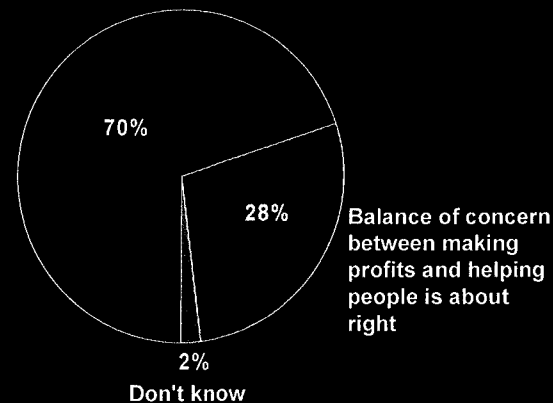
Many Believe Drug Companies Too Concerned with Profit

In general, do you think pharmaceutical or drug companies make too much profit, not enough profit, or about the right amount of profit?



Which statement comes closer to your view?

Drug companies are too concerned about profits, not concerned enough about helping people



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 8

Profits Seen As the Biggest Driver of Price of Prescription Drugs

I'm going to read you some factors that some people say contribute to the price of prescription drugs. For each, I'd like you to tell me if this is a major factor, a minor factor, or not a factor contributing to the price of prescription drugs.

	Major factor	Minor factor	Not a factor
Profits made by drug companies	79%	14%	5%
The cost of medical research	72%	22%	4%
The cost of marketing and advertising	62%	29%	8%
The cost of lawsuits against drug companies	56%	32%	9%

Note: "Don't know" responses not shown

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 9

Trust in Pharmaceutical Companies

How much do you trust pharmaceutical companies to...

	A lot	Somewhat	Not too much	Not at all
Develop new, effective drugs	25%	55%	14%	5%
Offer reliable information about side effects and safety of their drugs	21%	51%	17%	10%
Offer reliable information about how well their drugs will work	13%	58%	19%	10%
Inform the public quickly when they learn of a safety concern with one of their drugs	15%	40%	28%	16%
Price their products fairly	5%	36%	31%	27%

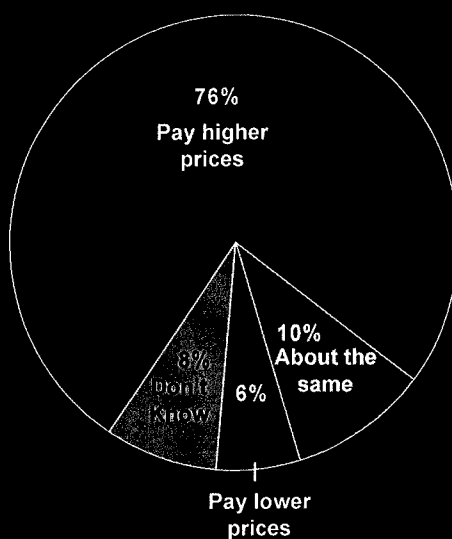
Note: "Don't know" responses not shown

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 10

Rx Drug Cost in the U.S. Relative to Other Countries

In general, do you think people in this country pay higher or lower prices than people in Canada, Mexico, and Western Europe pay for the same prescription drug, or do you think they pay about the same amount?



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 11

Government Regulation of Prescription Drugs

Percent saying the amount of government regulation in each area is...

	Not as much as there should be	About right	Too much
Limiting the price of Rx drugs	64%	24%	11%
Making sure Rx drugs are safe for people to use	44%	49%	8%
Making sure statements about benefits and side effects made in Rx drug ads are not misleading	43%	48%	6%

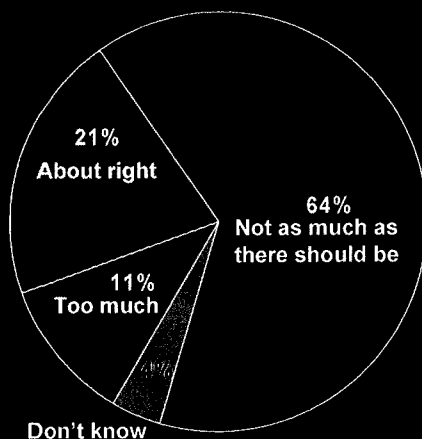
Note: "Don't know" responses not shown

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

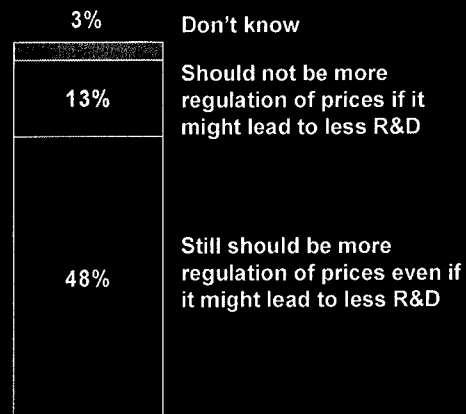
Chart 12

Almost Half Say Drug Prices Should Be Regulated Even If It Leads to Less Research and Development

Percent saying the amount of government regulation limiting the price of Rx drugs is...



What if you heard that limiting the prices of prescription drugs might lead to LESS research and development of new drugs since drug companies would be making smaller profits. Would you still think there should be more regulation of the prices charged for prescription drugs?



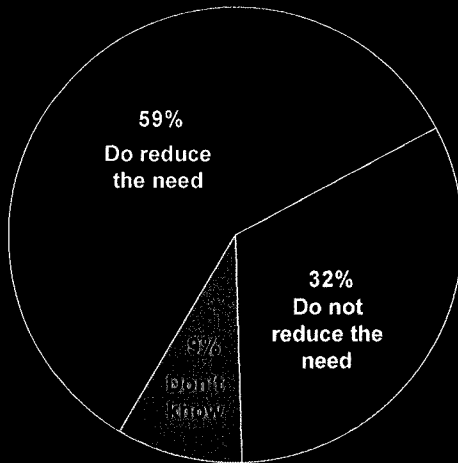
Note: "Don't know" responses not shown

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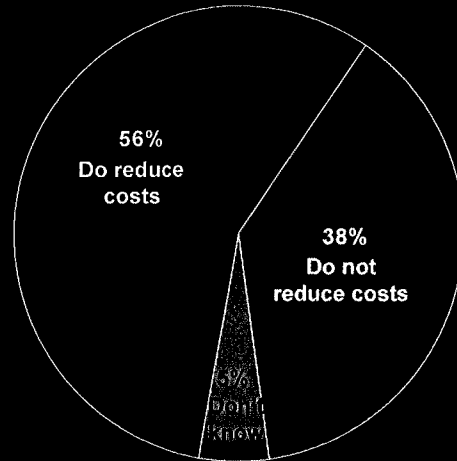
Chart 13

Many See a Role for Rx Drugs in Reducing Overall Health Care Costs

Do you think prescription drugs do or do not reduce the need for expensive medical procedures and hospitalization?



Do you think prescription drugs do or do not reduce health care costs by preventing illnesses?

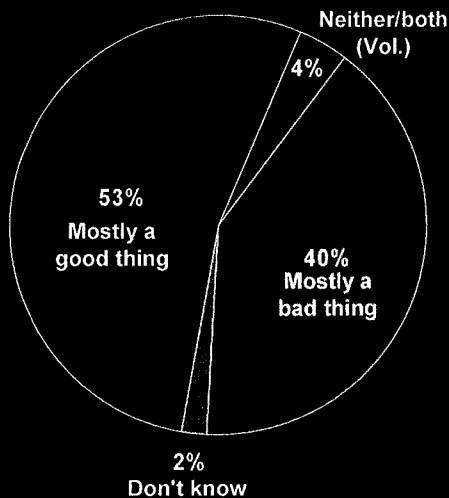


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

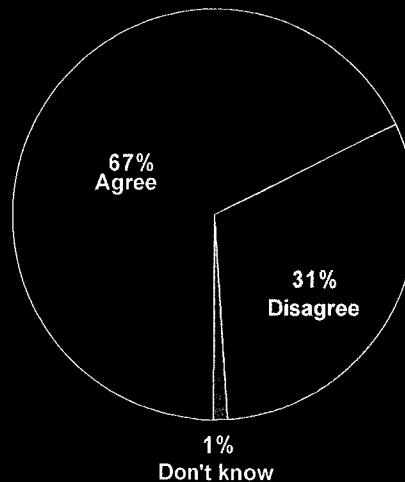
Chart 14

Rx Drug Advertising Viewed Mostly Positively

On balance, do you think prescription drug advertising is mostly a good thing, or mostly a bad thing?



Do you agree or disagree with this statement: Prescription drug ads educate people about available treatments and encourage them to get help for medical conditions they might not have been aware of



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 15

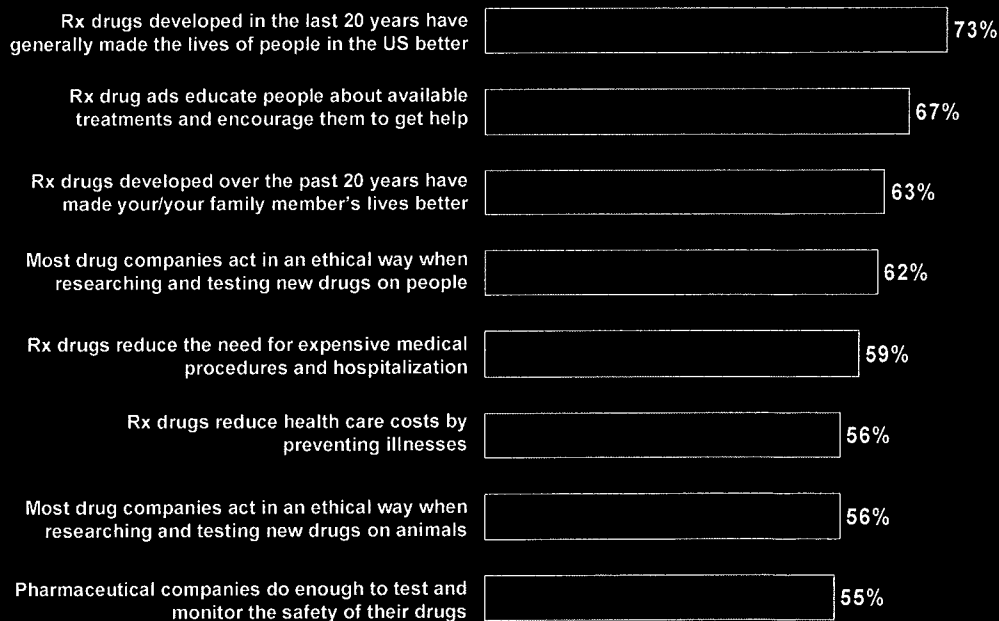
Some Negative Views of Rx Drug Ads

<i>Negatives of prescription drug ads</i>	<i>% who agree with each statement</i>	<i>% who say each bothers them "a lot"</i>
The cost of ads makes Rx drugs too expensive	77%	41%
Ads for Rx drugs encourage people to take medicine they don't need	66%	34%
There are too many Rx drug ads on television	68%	27%
Many Rx drug ads are too sexually explicit	46%	20%

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 16

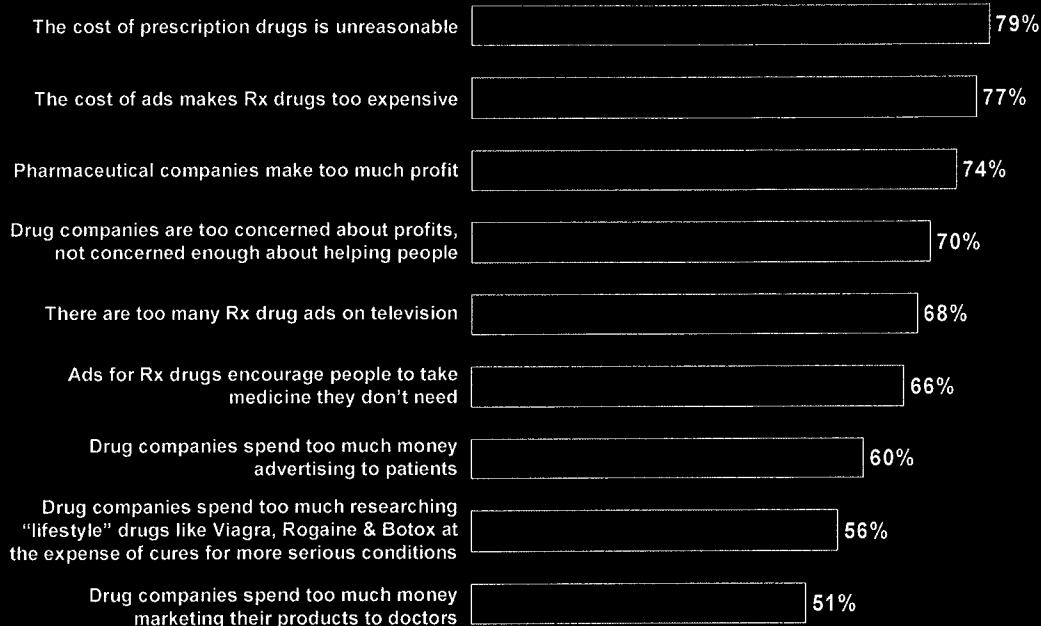
Summary: Top Positive Views of Rx Drugs and Drug Companies



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 17

Summary: Top Negative Views of Rx Drugs and Drug Companies

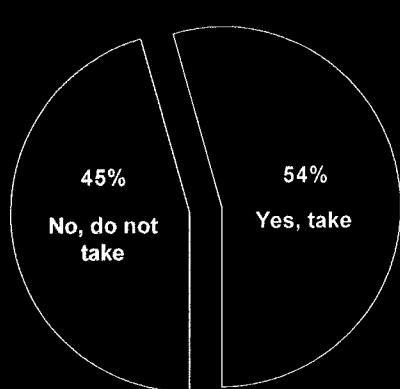


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 18

More Than Half Currently Take Prescription Drugs

Do you currently take any prescription medicine, or not?



How many different prescription drugs do you take?

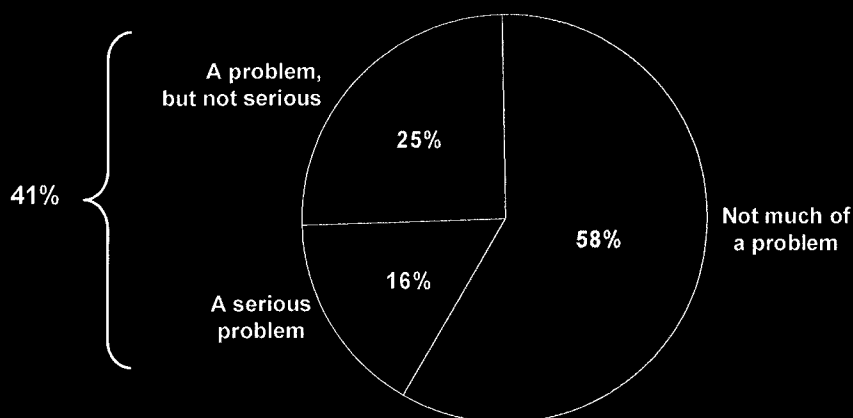


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 19

Significant Minority Has Problems Paying for Rx Drugs

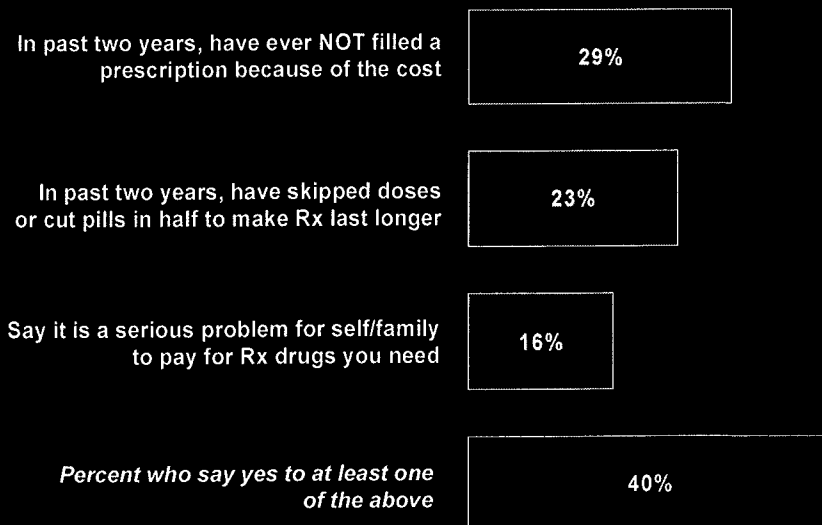
How much of a problem is it for you or your family to pay for prescription medicines that you need?



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 20

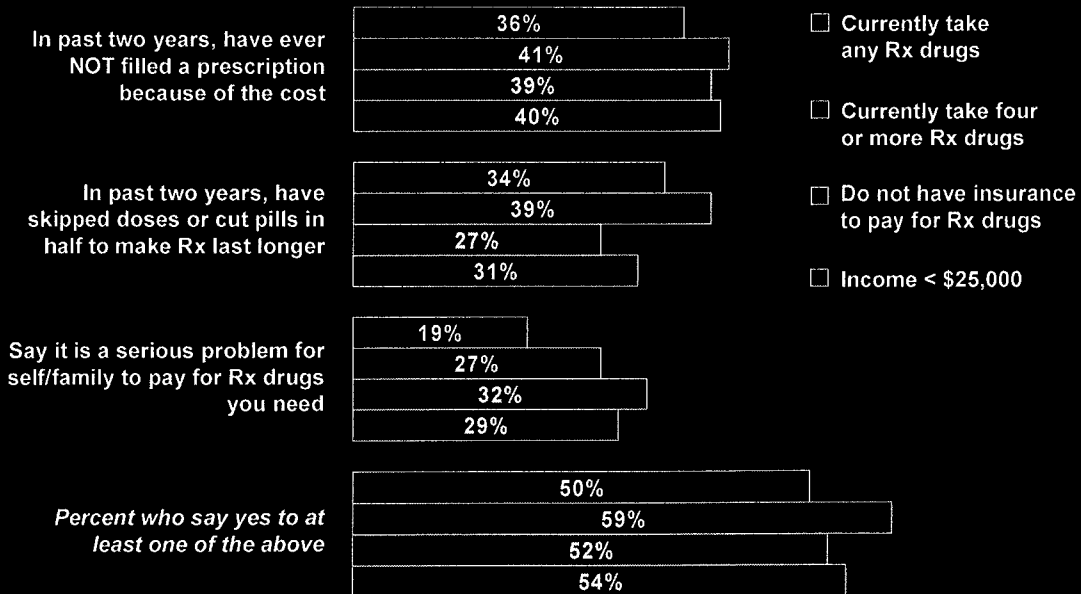
Serious Problems Paying, Not Filling Prescriptions and Skipping Rx Doses Because of Cost



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 21

Problems With Rx Costs More Common Among Those Who Take More Drugs, Those w/No Insurance, and Low-income

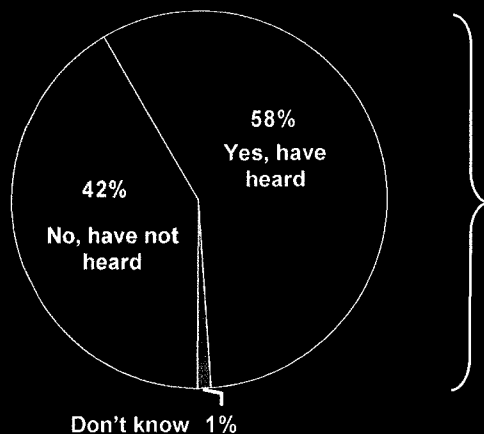


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 22

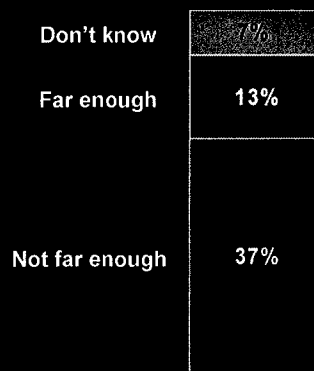
Awareness and Opinions of Drug Company Discount Programs

Have you heard of any programs by pharmaceutical companies that allow people who can't afford needed medications to apply for free or discounted drugs, or not?



Asked of those who said YES:

Do you think these programs go far enough or not far enough to help people who can't afford medications they need?

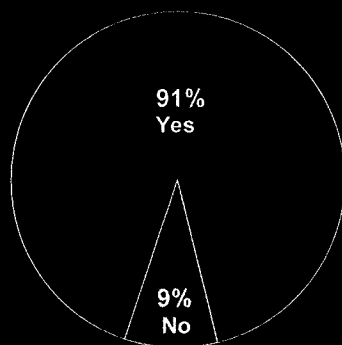


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

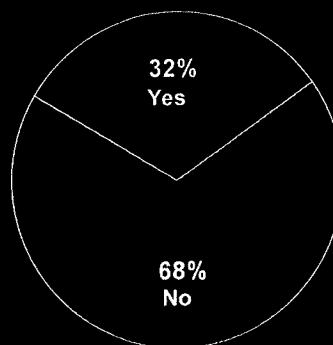
Chart 23

Awareness of Drug Advertising and Talking to Doctors

Have you seen or heard any advertisements for prescription drugs, or not?



As a result of seeing an ad for an Rx drug, have you ever talked with a doctor about the specific medicine you saw or heard advertised, or not?



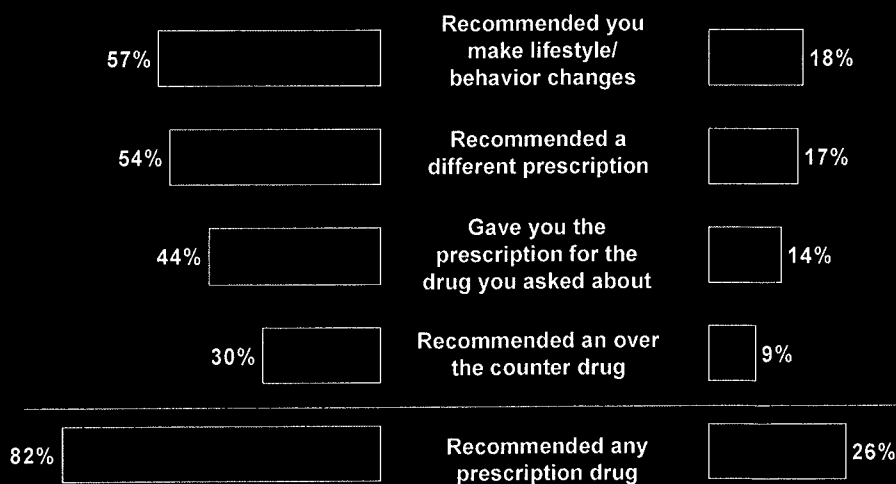
Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 24

Outcome of Talking to a Doctor as a Result of Ads

Among the 32% who have talked to a doctor as a result of seeing an Rx drug ad: Percent who said the doctor did one or more of the following...

Percent of total population who talked to a doctor as a result of seeing an Rx drug ad and said the doctor did one or more of the following...



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 25

Are Drug Ads Doing a Good Job Informing the Public?

Do prescription drug advertisements do an excellent job, a good job, only a fair job, or a poor job telling you about the following... ?

	Excellent	Good	Only fair	Poor
Potential benefits you might experience	12%	44%	34%	9%
What condition or disease the drug is designed to treat	10%	44%	34%	11%
Potential side effects you might experience	9%	36%	34%	19%

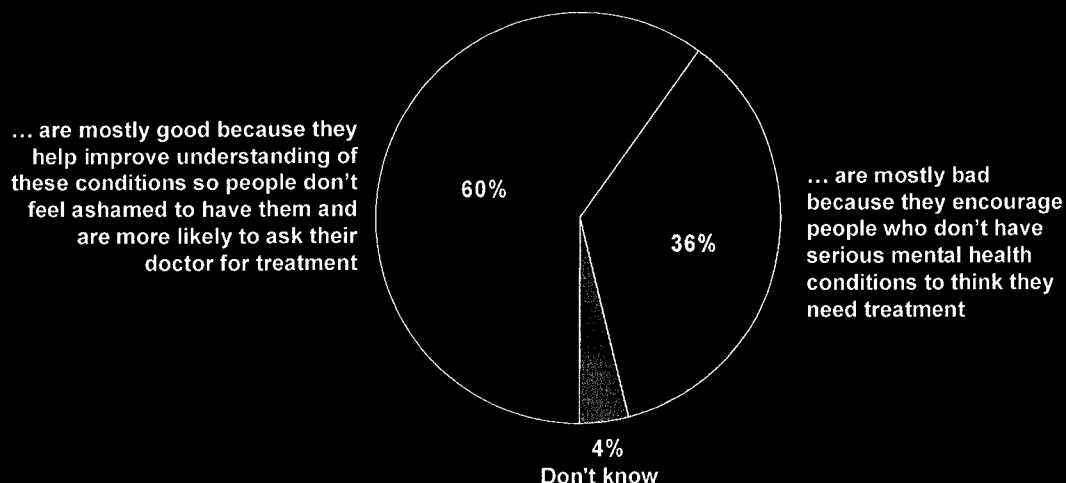
Note: "Don't know" responses not shown

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 26

Perception of Drug Ads for Mental Health Conditions

Which comes closer to your view:
Advertisements for prescription drugs to treat mental health conditions like depression and anxiety...?

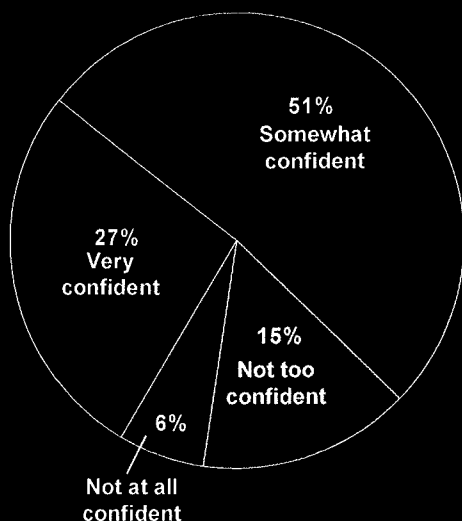


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

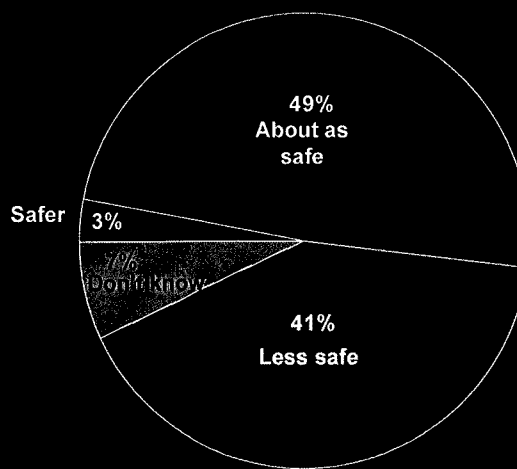
Chart 27

Most Are at Least Somewhat Confident in the Safety of Prescription Drugs

Overall, how confident are you that prescription drugs sold in the United States are safe?



Some drugs sold in the United States are actually manufactured in other countries. Do you think these drugs are safer. About as safe or less safe than those manufactured in the U.S.?

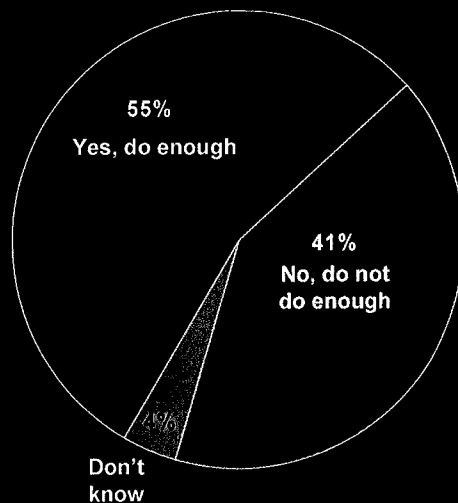


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 28

Pharmaceutical Companies' Safety Testing for Prescription Drugs

Do you think pharmaceutical companies do enough to test and monitor the safety of their drugs, or not?

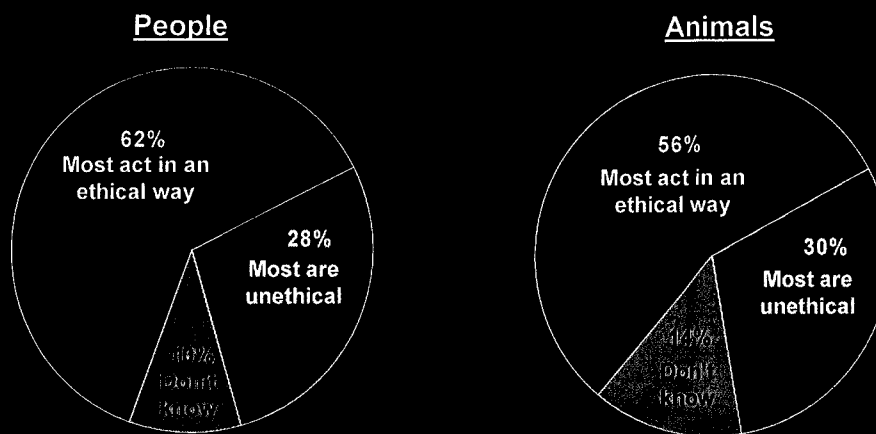


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 29

Majorities Believe Drug Companies Conduct Ethical Testing

Do you think most pharmaceutical companies act in an ethical way when researching and testing new drugs on (people or animals) or do you think most engage in (animal) testing practices that are unethical (and put people at risk)?



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 30

Influence of Pharmaceutical Companies

Do you think pharmaceutical companies have too much, too little or about the right amount of influence on...

	Too much	About the right amount	Too little
Which drugs are approved by the FDA	42%	34%	17%
Efforts to change the health care system in the U.S.	44%	24%	28%
Laws and regulations passed by Congress	50%	21%	18%

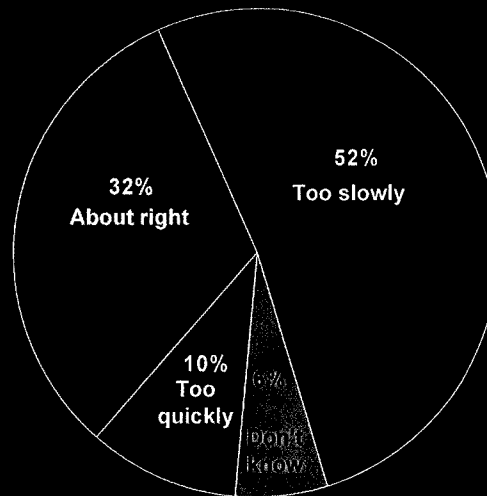
Note: "Don't know" responses not shown

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health: *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 31

Views of Governmental Review and Approval For Prescription Drugs

In general, do you think the government moves too quickly or too slowly to review and approve new prescription drugs, or do you think they take about the right amount of time?

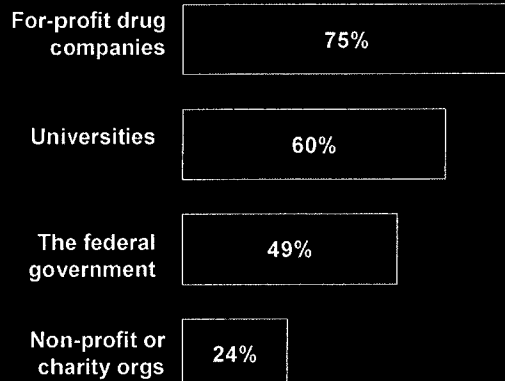


Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

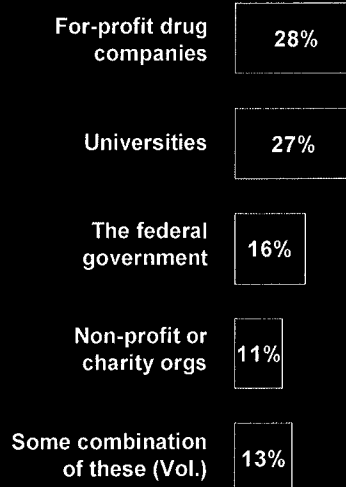
Chart 32

Role of Drug Companies and Other Groups in Drug Research and Development

How big a role do you think the following play in researching and developing new drugs? (percent saying each plays a "major role")



Who do you think **SHOULD** be primarily responsible for developing new drugs? (percent choosing each when forced to choose)



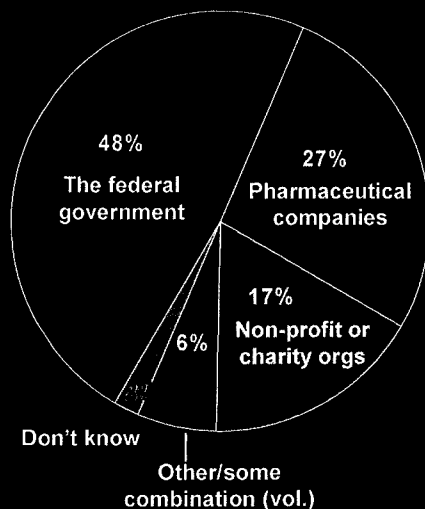
Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 33

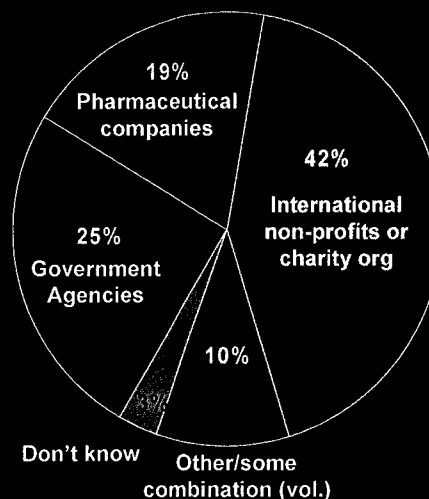
Responsibility for Research on Orphan Drugs and Drugs for People in Poor Countries

Who should be responsible for making sure research is conducted on...

...drugs to treat conditions that affect a relatively small number of people?



...drugs to treat conditions that mainly affect people in poorer countries around the world who cannot afford to pay a lot for drugs?



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 34

Sources of Information for Rx Drugs

Please tell me how much you rely on each of the following sources to provide accurate information about prescription medicines:

	<input type="checkbox"/> A lot	<input type="checkbox"/> Somewhat	<input type="checkbox"/> Not too much	<input type="checkbox"/> Not at all
Your doctor	72%	19%	5%	3%
Your pharmacist	51%	30%	9%	10%
Info. about the product in the Rx package	43%	38%	8%	10%
Gov. agencies like FDA	22%	32%	14%	30%
Family and friends	15%	30%	21%	33%
Internet websites	11%	27%	11%	48%
Ads for Rx drugs	4%	23%	25%	47%

Note: "Don't know" responses not shown

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

Chart 35

Doctors More Often Questioned About Drug Safety, Pharmacists About Costs

When your doctor writes a prescription for a drug you haven't taken before, do you usually talk to him or her about...
(percent saying "yes")

The cost you will have to pay for the new medication

44%

The safety and potential side effects of the drug

77%

When you fill a new prescription at the pharmacy, do you usually talk to your pharmacist about...
(percent saying "yes")

Whether there is a less expensive alternative available

61%

The safety and potential side effects of the drug

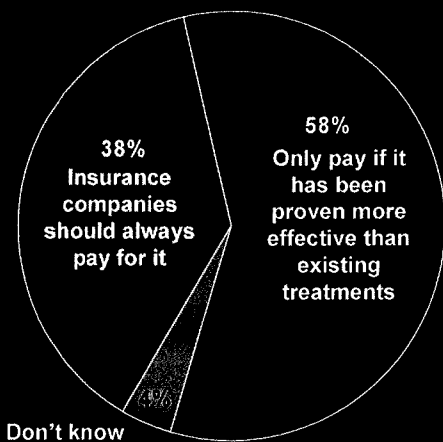
59%

Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)

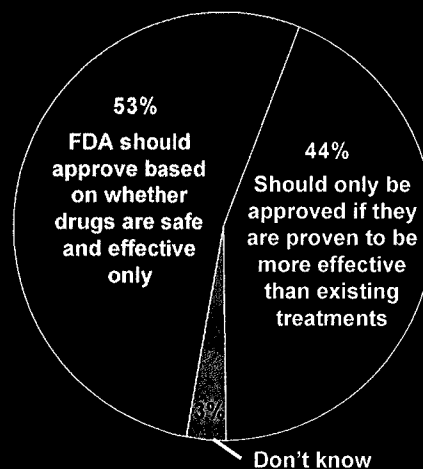
Chart 36

Proving Effectiveness of New Drugs Compared to Existing Treatments

If a doctor recommends an expensive new drug, do you think insurance companies should always pay for it, or should they only pay for the new drug if it has been proven to be more effective than existing treatments?



When deciding which prescription drugs should be approved for sale in the U.S., do you think the FDA should approve drugs based on whether they are safe and effective only, or do you think new drugs should only be approved if that are proven to be more effective than existing treatments?



Source: USA Today/Kaiser Family Foundation/Harvard School of Public Health. *The Public On Prescription Drugs and Pharmaceutical Companies* (conducted Jan. 3-23, 2008)



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